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ABSTRACT

This document contains validated activities and competencies needed by information professionals working in an archive or museum. The activities and competencies are organized according to the functions which information professionals in archives or museums perform: acquisitions; cataloging/indexing; reference; exhibit management; and organization/management support. Within each function, competencies are grouped under the categories of Knowledge, Skills, and Attitudes, and three professional levels are dealt with: entry level (0-3 years experience), mid-level (4-9 years experience), and senior level (10 or more years experience). (THC)

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NEW DIRECTIONS IN LIBRARY AND INFORMATION SCIENCE EDUCATION
FINAL REPORT
VOLUME 2.9
ARCHIVIST/MUSEUM PROFESSIONAL COMPETENCIES

1984

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INTRODUCTION

This document contains validated activities and competencies needed by information professionals working in an archive or museum. The following operational definition of competency was developed:

> **A competency is a generic knowledge, skill or attitude of a person that is casually related to effective behavior as demonstrated through external performance criteria, where:**
>
> - **Knowledge is having information about, knowing, understanding, being acquainted with, being aware of, having experience of, or being familiar with something, someone, or how to do something.**
> - **Skill is the ability to use one's knowledge effectively.**
> - **Attitude is a mental or emotional approach to something, or someone.**

We have identified several types of knowledge that are necessary to perform information work satisfactorily as follows:

- Basic knowledge in such areas as language, communication, arithmetic operations, etc.
- Subject knowledge of primary subject fields of users served such as medicine, chemistry, law, etc.
- Library and information work environments such as the information community, its participants and their social, economic and technical interrelationships, etc.
- Knowledge of what work is done such as the activities required to provide services and produce products, etc.
- Knowledge of the organization or user community served such as the mission, goals, and objectives of the user or the organization, user's information needs and requirements, etc.

There appear to be three kinds of skills necessary to perform information work satisfactorily including:

- Basic skills such as cognitive, communication, analytical, etc.
- Skills related to each specific activity being performed such as negotiation of reference questions, evaluation of search outputs, etc.
- Other skills such as managing time effectively, budgeting and making projections, etc.

Attitudes of information professionals are found to be extremely important to work performance. We have found it useful to subdivide attitudes into:

- Dispositional attitudes toward one's profession, the organization served, one's work organization, and other people such as users and co-workers.
- Personality traits/qualities such as confidence, inquisitiveness, sense of ethics, flexibility, etc.
- Attitudes related to job/work/organization such as willingness to accept responsibility, willingness to learn, desire to grow, etc.

The activities and competencies are organized according to the functions which information professionals perform, and by professional level as displayed in Figure 1. The competencies are cumulative across professional level, i.e., competencies of mid-level professionals include entries shown at the mid-level as well as those at the entry level, etc.

It is important to understand the distinction between functions performed and positions or job titles. Our rationale behind the functional approach was that we were more concerned with what information professionals do than with what they are called. In a single-person unit, therefore, the information professional will undoubtedly perform more than a single function. In using and interpreting the competency data in this document, it is important to consider the functions being performed by

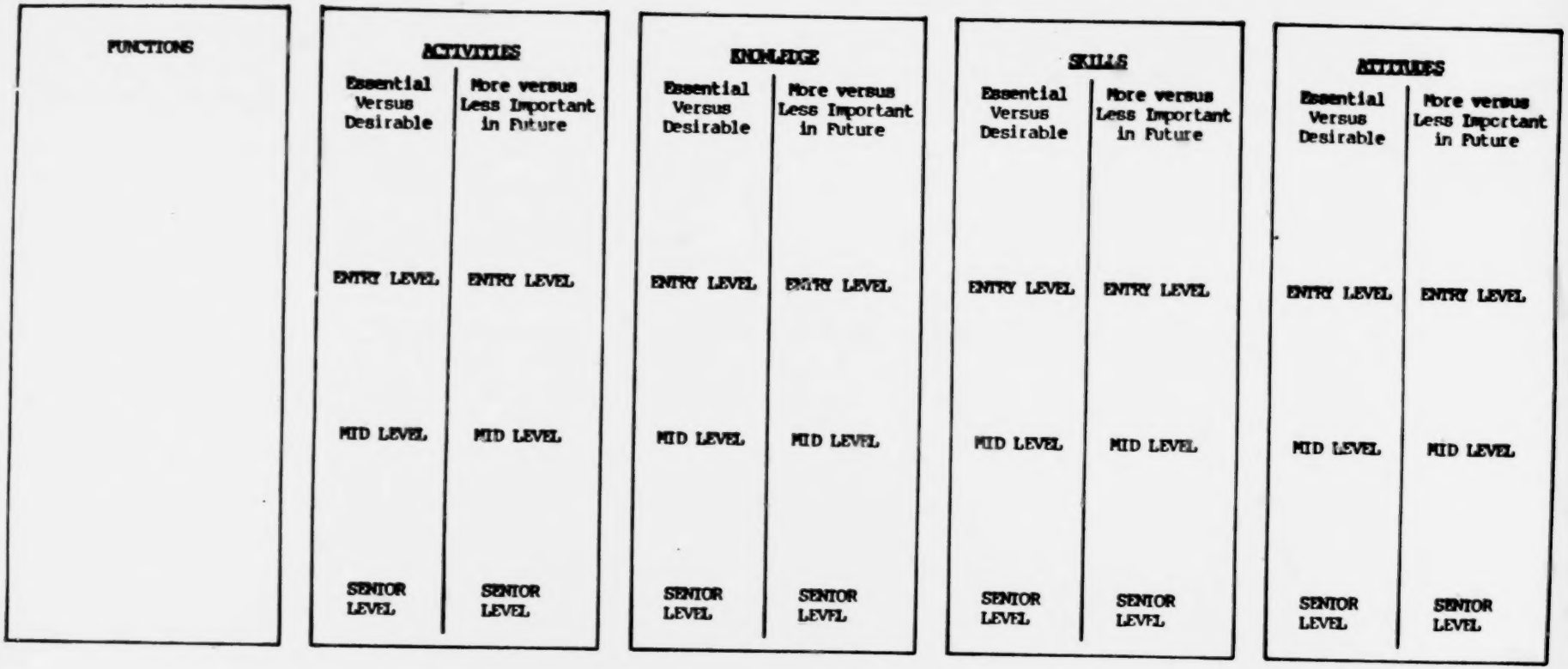

Figure 1 Organization of Activities and Competencies

professionals and the activities being performed to determine which competencies are appropriate. The functions identified for information professionals working in an archive or museum are:

- acquisitions
- cataloging/indexing
- reference
- exhibit management
- organization/management support.

Three professional levels were defined as follows:

- entry level (up to 3 years of professional experience)
- mid level (4-9 years of professional experience)
- senior level (10 or more years of professional experience).

The activities performed are listed first and numbered sequentially. The actual assignment of individual activities to subcategories of the major activities and to the functions varies from one worksetting to another. The organization of activities that we developed provided us with the "best fit" case. Indented and unnumbered activities are essentially paraprofessional activities which, in small organizations, may be performed by professionals.

ARCHIVIST/MUSEUM PROFESSIONAL COMPETENCIES

ACQUISITIONS

ACTIVITIES

ACQUISITIONS **ENTRY LEVEL**

Selection

1. Work on developing in-depth understanding of the organization's collection development policies and guidelines

2. Work on developing in-depth knowledge of the structure of and developments in the subject field(s) of interest to the organization

3. Review assigned newspapers, journals, newsletters, catalogs, etc., in the subject field(s) of interest to the organization

4. Annotate information which may be of potential interest to higher level staff and which may lead to present or future acquisition of materials for the collection(s)

5. When requested by senior staff, search accession and/or catalog/index records to determine extent of existing holdings in certain areas

Vertification and Ordering/Requesting

6. Locate any additional information which may be required before orders/requests for materials may be initiated; refer problems to mid level staff

7. Supervise ordering/requesting selected materials for the collections which senior staff have designated as being suitable for acquisition

Receipt Processing

8. Notify senior staff of arrival of expected shipments of particularly valuable materials for the collection(s)

9. Supervise receipt processing of all other materials:

   sort incoming items, as appropriate
   unpack and examine incoming materials; refer damaged/fragile materials to supervisor
   search in-process file to locate the order/request records
   refer to the supervisor items which differ from the item ordered/requested
   update records with receipt of individual items/collections
   create records for unsolicited materials which are to be processed
   assign an accession number to each item/collection received and retained

ACQUISITIONS — ENTRY LEVEL

Receipt Processing (cont'd)

9. Supervise receipt processing of all other materials (cont'd):

   record/affix accession number/information on each piece (if appropriate); may be bar code/OCR label to allow for tracking of materials from time of receipt through completion of the processing cycle
   mark materials with the organization's identification, if appropriate
   affix security labels, if required
   place materials for cataloging/indexing on the appropriate trucks
   deliver trucks to proper locations
   send form letters to acknowledge deposited materials/gifts, if appropriate
   annotate receipt on packing slips/invoice copies, if received, and forward to the fiscal control unit
   annotate packing slips/invoice copies for damaged materials
   prepare damaged materials, incorrectly supplied materials, and unwanted materials for return to suppliers, if appropriate, pending review by mid level staff
   place surplus materials in specified area to await proper disposal
   maintain record of receipt processing statistics

File Maintenance

10. Supervise creation and maintenance of master in-process file records for all materials ordered/requested/received for the collections; include data on the individual/office placing the order/request and accessioning data

    input orders/requests, unsolicited receipts
    update records based on correspondence received and actions taken
    update records with receipt, return and disposal information
    delete records, if and when appropriate
    maintain statistical records of file creation and maintenance operations

11. Supervise maintenance of a want-list file with information supplied by senior staff; this data may be included in the master in-process file

Other

12. Handle general problems related to ordering and receipt processing and to overall maintenance of in-process and accession records; refer problems, as necessary, to higher level staff

ACQUISITIONS — MID LEVEL

Other (cont'd)

13. Keep abreast of developments in the information field, in archive/museum/collection practice, and in legislation that affect acquisition and processing of materials/collections for archives, museums and special collections

Selection

14. Review information notices annotated by lower level staff which will/may lead to order/request action

15. Educate lower level staff about information of interest to the organization which they may have overlooked in their assigned sources

16. Recommend course of action on each notice, including additional notices obtained from personal review of other sources

17. Supervise the maintenance of a file (automated or manual) of actual and potential sources of materials for the collection(s)

18. Examine unsolicited materials received for the collection(s) to determine if the materials are suitable for retention; confer with higher level staff as appropriate

19. Assign processing priorities to all materials selected for the collections; refer questions to senior staff

Verification and Ordering/Requesting

20. Process orders/requests for special materials, as assigned

21. Supervise the status of all outstanding orders/requests in the master in-process file; prepare status reports at specified intervals

22. Prepare draft form letters for ordering/requesting materials for the collection(s) and for acknowledging gifts

23. Work with the appropriate fiscal office to schedule purchases of materials in order to operate within the budget

24. Work with the appropriate fiscal office to develop procedures for handling the final steps in ordering and invoice processing

Receipt Processing

25. Develop procedures for receipt processing of all types of materials

ACQUISITIONS — MID LEVEL

Receipt Processing (cont'd)

26. Review/appraise all materials received; construct appraisal statements for inclusion in accession records

File Maintenance

27. Develop procedures for maintenance of records for order/receipt control of materials for the collection(s)

28. Make preliminary selection of forms and/or develop draft record formats for all section files

29. Work with data processing staff or contractors to develop/adapt an automated system to support section records/files

Fiscal Control

30. Work with the appropriate fiscal office of the parent organization to identify requirements and develop draft procedures for purchasing materials and services

31. Work with the appropriate fiscal office to develop procedures for proper packing slip/invoice handling and receipt certification by section staff

32. Assist the appropriate fiscal office in resolving any problems related to payment for materials

33. Remain aware of the expenditures and balances in the materials account(s); notify the section manager of situations which may require special action

34. Develop projected budget requirements for purchasing materials for the new fiscal year

Other

35. Assist senior staff in negotiating with representatives of dealers, auction houses, etc.

ACTIVITIES

ACQUISITIONS	SENIOR LEVEL

Selection

36. Formulate draft collection development policies for acquiring materials for the collection(s); prepare revisions as required

37. Identify materials from new subject areas and/or in new formats which the organization may wish to collect

38. Prepare selection guidelines to be used by staff as an aid to interpreting collection development policies

39. Based on knowledge of the field(s) of interest to the organization, identify potential sources of materials for the collection(s)

40. Receive information from senior staff of the organization on potential sources of materials for the collection(s)

41. Try to obtain materials by individuals currently making contributions in the field(s) of interest to the organization

42. Identify information sources which will be reviewed/contacted regularly by section staff to obtain information on potential sources of materials for the collection(s)

43. Assign staff to review/contact each information source on a regular basis

44. Review staff recommedations on potential sources of materials for the collection(s)

45. Select course of action (acquire/do not acquire) for each potential source; confer with senior administrative staff as required

46. Maintain a statistical record of the usefulness of the various information sources as tools for potential collection development

47. Supervise the preparation and coordination of documentation on materials selected for acquisition which will require approval by senior administrative staff because of their cost or sensitive nature; justify collecting the materials based on analysis of the existing collection(s)

48. Determine which materials selected for the collections should be placed in a want-list file for possible order/request action at a later time

ACQUISITIONS — SENIOR LEVEL

Verification and Ordering/Requesting

49. Determine the method by which individual materials/collections of materials will be ordered/requested for inclusion in the organization's collection(s); methods include use of purchase orders, standard form letters, personal letters, phone calls, auction bidding (in person, by representative, or by phone/mail/telegram) and personal contact (by section staff, by administrative staff, or by the organi- zation's director)

50. Determine which staff member or organizational office will place each order/request for materials

51. Justify over-budget expenditures for extraordinary items

52. Forward information on orders/requests which will be handled by senior staff of the organization to the appropriate staff

53. Process orders/requests which require special processing

54. Forward copies of all information for order/request action to entry level staff for input to the master in-process file

Receipt Processing

55. Supervise unpacking and receipt processing of particularly valuable materials

56. Notify the section manager and appropriate administrative staff that special acquisitions are available for their review

57. Obtain the assistance of appropriate experts in appraising particularly valuable or unusual materials

Other

58. Function as a technical expert in all matters related to selection and acquisition of materials for the collection(s)

59. Establish and maintain professional contacts, both formal and informal, to assist in the acquisition process

60. Meet with dealers' representatives and representatives of auction houses, etc., to learn about the particular services they offer

ACQUISITIONS — SENIOR LEVEL

Other (cont'd)

61. Assist the section manager in negotiating with dealers' representatives to obtain the required level of service in acquiring materials

62. Evaluate dealers' performance and report to section manager

63. Identify dealers, donors, etc., who have a good performance record in supplying unique and/or valuable materials for the collection(s)

ACQUISITIONS — ENTRY LEVEL

Basic knowledge

knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

knowledge of the primary subject fields of interest to the organization (e.g., art, science and technology, history, medicine, public administration, law, etc.)
knowledge in greater depth in specific subjects (e.g., history of art, history of science and technology, history of medicine, history of the civil war, etc.)
knowledge of foreign languages

Library & Information Science Knowledge (Generic)

knowledge of definition, structure, and formats of information
knowledge of alternative approaches to the organization of information
knowledge of alternative approaches to retrieval of information
knowledge of alternative approaches to information management
knowledge of available and emerging information technologies and their applications
knowledge of completed and ongoing research in the field and its applicability to practice
knowledge of career opportunities
knowledge of how to learn on an ongoing basis

Knowledge about information work environments

knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
knowledge of the variety of work settings and their organizational structures
knowledge of the functions performed within the various work settings and the services and products offered
knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

knowledge of the acquisitions function, the range of services and products offered (both actual and potential)
knowledge of the activities that are required to offer the services and produce the products
knowledge of the various resources that are necessary to support the activities
knowledge of acquisitions tools and sources of acquisitions-related information

ACQUISITIONS — ENTRY LEVEL

Knowledge of what work is done (cont'd)

knowledge of acquisitions methods and techniques for materials suitable for the collection(s)
knowledge of accessioning methods and techniques
knowledge of job responsibilities
knowledge of performance expected and how it can be measured

Knowledge of how to do work

knowledge of how to perform the various activities
knowledge of how to use the acquisitions tools and sources of information
knowledge of how to apply the acquisitions methods and techniques
knowledge of how to apply the accessioning methods and techniques

Knowledge of the organization and the specific work unit

knowledge of the mission, goals and objectives of the organization
knowledge of the structure of the organization and the role of the acquisitions section within the organization
knowledge of the various projects and key personnel within the organization
knowledge of the policies and procedures relevant to section operations
knowledge of the various resources available within the organization (e.g. personnel, equipment, etc.)
knowledge of the collecting needs and requirements to support the mission, goals and objectives of the organization
knowledge of the organization's collection(s), and of related privately owned collections

ACQUISITIONS — MID LEVEL

greater depths of knowledge specified above
knowledge of appraisal methods and techniques
knowledge of how to apply appraisal methods and techniques
knowledge of standards and guidelines for appraisals
knowledge of the operations of other sections in the organization and how they relate to acquisitions
knowledge of available vendor-supplied systems, services and products to support acquisitions
knowledge of the contracting process, both in general and within the organization
knowledge of evaluation methods and techniques to evaluate systems, services and products

ACQUISITIONS	SENIOR LEVEL

greater depths of knowledge specified above
knowledge of potential sources of materials for the collection(s)
knowledge of experts in appraising materials
knowledge of public relations techniques
knowledge of statistical description, analysis, interpretation and presentation
knowledge of the costs associated with resources (materials, personnel, space, etc.)
knowledge of cost analysis and interpretation methods
knowledge of methods of resource allocation
state-of-the-art knowledge of research and practice as it relates to the acquisition of materials for archives, museums and/or special collections

SKILLS

ACQUISITIONS — ENTRY LEVEL

Basic Skills

literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

perform each activity
use computer and telecommunications equipment/systems with ease
properly interpret collecting guidelines
establish rapport with colleagues
communicate well by written, verbal and non-verbal means
listen carefully
obtain/elicit required information from formal and informal sources
examine materials with keen observation
collect, analyze and interpret data
make decisions and recommendations based on available information
work independently and in groups
develop criteria for evaluation
make effective, timely, and well-informed decisions
isolate and define problems and develop the necessary criteria and action for their solution
manage time effectively
conduct meetings with individuals and groups
supervise staff

ACQUISITIONS — MID LEVEL

Skills Related to Each Specific Activity

Skills listed above are developed to a greater extent

Ability to:

appraise materials for their value to the collection(s) and for their monetary value
develop procedures to maintain control of fiscal affairs
communicate with data processing staff and other in-house and support/contract staff on a technical level
arbitrate and negotiate with contractors' representatives

ACQUISITIONS — SENIOR LEVEL

Skills listed above are developed to a greater extent

Ability to:

develop collecting policy guidelines
establish rapport with representatives of dealers, auction houses, private collectors, etc.
negotiate with dealers, private collectors, etc. for acquisition of materials in their stock/collections
estimate the cost of obtaining materials to support the collecting needs of the organization
justify additional expenditures for extraordinary items
identify new areas in which the organization may begin to collect
anticipate long-range needs of the section and of the organization
identify and define gaps in collection coverage
design systems and procedures to improve operations of the section and of the organization
apply methods of measurement and evaluation
budget and make projections
optimize the use of organizational and section resources

ATTITUDES

ACQUISITIONS

Dispositional Attitudes

Attitudes Toward Institutions

Respect for profession
Respect for the section
Respect for the parent organization

Attitudes Toward Other People

Toward Users

Respect users
Like people in general
Like to help people
Like to meet people
Like to make others feel comfortable
Sensitive to others' needs

Toward Others in the Workplace

Respect co-workers
Like to work with others/as a team
Like to work on own
Willingness to draw upon and share knowledge and experience with others
Supportive of co-workers
Enjoy managing/supervising others

Personal Qualities

Alertness
Assertiveness
Compassion/Kindness
Confidence
Cheerfulness
Dependability
Determination/Tenacity
Diplomacy
Emotional stability
Fairness
Flexability/Versatility
Imagination
Inquisitiveness
Leadership ability
Neatness
Need for achievement

ACQUISITIONS

Personal Qualities (cont'd)

Objectivity
Open-mindedness
Optimism/Positive attitude
Organization
Patience
Physical endurance
Resourceful
Sensitive/Thoughtful
Sense of humor
Sense of ethics
Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

Willingness to take/accept responsibility
Willingness to take initiative
Willingess to respond to authority, apply and follow policy
Realization that there is no single "right" way to achieve the goals of the section/organization
Desire to learn/try
Willingness to fail
Willingness to ask questions
Desire to work to best of ability
Responsiveness to time constraints
Accuracy
Willingness to get hands dirty
Attention to detail
Willingness to do clerical tasks
Desire to follow-through
Service orientation
Organizational identity
Willingness to promote parent organization and its services
View of parent organization as part of a larger information environment
Ability to see broad picture
Ability to sacrifice short-term gains for long-term goals
Political sense
Curiosity
Variety of interests
Desire to grow personally
Desire to grow professionally
Desire to remain current in specific and general subject field
Positive attitude toward job

ARCHIVIST/MUSEUM PROFESSIONAL COMPETENCIES

CATALOGING/INDEXING

ACTIVITIES

CATALOGING/INDEXING	ENTRY LEVEL

1. Review each item to be cataloged; note special visual/informational features, arrangement of materials in a manuscript collection, etc.
2. Supervise and/or perform pre-cataloging searching
3. Perform descriptive cataloging/indexing
4. Determine main and added entries
5. Assign subject headings from the approved list(s) of headings
6. Classify materials using the approved classification system(s) or assign appropriate locator data
7. Establish cataloging/indexing authority data
8. Establish cross reference data
9. Consult reference books, online files and/or make phone calls to obtain information necessary for cataloging/indexing
10. Prepare the main entry cataloging/indexing record for each item/collection
11. Refer cataloging/indexing problems to higher level staff
12. Recatalog/re-index and reclassify/relocate materials already in the collection(s), as required
13. Keep abreast of changes relating to cataloging/indexing procedures (e.g., in-house memos, new subject terms, national/international standards of description and record formatting, changes in instructions for searching/updating online files, etc.)
14. Maintain a record of pre-cataloging searching statistics
15. Maintain a record of cataloging/indexing statistics

Other

16. Prepare manuals of procedures for pre-cataloging/pre-indexing searching
17. Select/develop a processing form to be used in pre-cataloging/pre-indexing searching

CATALOGING/INDEXING — ENTRY LEVEL

Other (cont'd)

18. Keep abreast of developments in the information field or archive museum/collection practice that affect cataloging/indexing, classification, access to data/materials in the collection(s), and collection information files and networks

CATALOGING/INDEXING — MID LEVEL

19. Perform cataloging/indexing and classification of difficult materials

20. Arrange manuscript collections and prepare detailed descriptions and/or finding guides, as appropriate

21. Resolve cataloging problems encountered by entry level staff; refer problems to senior level staff, if necessary

File Maintenance

22. Supervise all procedures related to online entry of cataloging/indexing data

23. Supervise proofreading of computer printouts of cataloging/indexing data, if applicable

24. Supervise preparation of ordering/preparation of card sets, if a card catalog is maintained

25. Supervise and revise filing of cards, if required

26. Supervise physical maintenance of the card catalog, if required:

    replace catalog cards, guide cards and drawer labels; shift cards as required

27. Supervise automated or manual storage of all archival and/or reference visual images of materials added to the collection(s)

CATALOGING/INDEXING — MID LEVEL

File Maintenance (cont'd)

28. Supervise updating the cataloging/indexing files (online or manual):

    add/correct locator data
    indicate number of quasi-identical items owned
    indicate holdings/contents data for collections
    indicate withdrawal (temporary or permanent) or loss of materials
    delete/correct incorrect records

29. Supervise regular production of lists of new accessions that have been cataloged/indexed

30. Maintain statistical records of operations relating to the creation and maintenance of cataloging/indexing files

Materials Processing

31. Supervise the physical processing of all newly-cataloged/indexed materials/collections:

    check for/affix organization's indentification symbol and security label on each item, as appropriate
    place materials in appropriate storage containers, if applicable
    apply classification/location markings/labels
    photograph or microfilm, as appropriate, materials to be added to the collection(s)
    segregate materials requiring conservation/preservation treatment and deliver to collection maintenance staff
    place new materials/collections on trucks and deliver to designated locations for in-house or remote facility storage

32. Maintain statistical records of operations related to physical processing of materials

Other

33. Prepare manuals of procedures for file maintenance and materials processing activities

34. Select/develop processing forms/input forms for all activities supervised

35. Work closely with collection maintenance staff during inventories and/or weeding of the collection(s) so that cataloging/indexing records may be updated as required

CATALOGING/INDEXING — MID LEVEL

Other (cont'd)

36. Notify collection maintenance staff of any difficulties encountered in physical processing of materilas using approved methods and prescribed storage containers

37. Supervise any cataloging/indexing, file maintenance and materials processing activities which may be performed by contractors

CATALOGING/INDEXING — SENIOR LEVEL

38. Function as a technical expert in all matters related to cataloging/indexing and physical processing of materials for the collection(s)

39. Draft cataloging/indexing procedures and policies; draft revisions as required

40. Prepare/update cataloging/indexing manuals and other aids to improve the quality of cataloging/indexing produced by staff/contractors

41. Select/develop cataloging/indexing input forms

42. Draft guidelines for determining the level of cataloging/indexing to be given to various categories of materials

43. Keep abreast of the collection access needs of organizational staff and researchers, so that ready access to topics of special importance may be achieved

44. Recommend expansion of the organization's classification system(s), as required

45. Recommend expansion of the organization's standard list of subject headings, as required

46. Recommend participation in various information network(s)/projects

47. Represent the organization as a technical expert at meetings of networks, consortia and other cooperating groups

48. Keep abreast of developments in network, national and international standards for description of materials in archives, museums and special collections

CATALOGING/INDEXING	SENIOR LEVEL

49. Supervise the procedures and quality of data for input to cooperative information systems/projects

50. Make inquiries and recommendations concerning the demand for publication and distribution of book/microform/videodisc catalogs of (portions of) the collection(s), lists of new materials cataloged/ indexed, etc.

CATALOGING/INDEXING — ENTRY LEVEL

Basic knowledge

knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

knowledge of the primary subject fields of interest to the organization (e.g., history, art, science and technology medicine, public administration law, etc.)
knowledge in greater depth in specific subjects, (e.g., public affairs, international affairs, military affairs, education of specific groups, etc.)
knowledge of foreign languages

Information Science Knowledge (Generic)

knowledge of definition, structure, and formats of information
knowledge of alternative approaches to the organization of information
knowledge of alternative approaches to retrieval of information
knowledge of alternative approaches to information management
knowledge of available and emerging information technologies and their applications
knowledge of completed and ongoing research in the field and its applicability to practice
knowledge of career opportunities
knowledge of how to learn on an ongoing basis

Knowledge about information work environments

knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
knowledge of the variety of work settings and their organizational structures
knowledge of the functions performed within the various work settings and the services and products offered
knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

knowledge of the cataloging/indexing functions, the range of services and products offered (both actual and potential)
knowledge of the activities that are required to offer the services and produce the products
knowledge of the various resources that are necessary to support the activities

CATALOGING/INDEXING — ENTRY LEVEL

Knowledge of what work is done (cont'd)

knowledge of cataloging/indexing tools
knowledge of cataloging/indexing methods and techniques
knowledge of job responsibilities
knowledge of performance expected and how it can be measured

Knowledge of how to do work

knowledge of how to perform the various activities
knowledge of how to use the cataloging/indexing tools
knowledge of how to apply the cataloging/indexing methods and techniques
knowledge of the conservation/preservation requirements for materials added to the collection(s)
knowledge of signs of deterioration

Knowledge of the organization and specific work unit

knowledge of the mission, goals and objectives of the organization
knowledge of the structure of the organization and the role of the section within the organization
knowledge of the various projects and key personnel within the organization
knowledge of the policies and procedures relevant to section operations
knowledge of the various resources available within the organization (e.g. personnel, equipment, etc.)
knowledge of the needs and requirements for access to information about the collection(s) in order to support the mission, goals and objectives of the organization
knowledge of the organization's collection(s)

CATALOGING/INDEXING — MID LEVEL

greater depths of knowledge specified above
knowledge of the operations of other sections in the organization and how they relate to cataloging/indexing
knowledge of available vendor-supplied systems, services and products to support cataloging/indexing

CATALOGING/INDEXING — MID LEVEL

knowledge of the contracting process, both in general and within the organization
knowledge of evaluation methods and techniques to evaluate systems, services and products
knowledge of quality and production control techniques and procedures

CATALOGING/INDEXING — SENIOR LEVEL

greater depths of knowledge specified above
knowledge of the relative value/importance of providing additional access to the collection(s) through participation in cooperative/special projects
knowledge of in-house/contract experts in conservation/preservation
knowledge of optimum storage conditions for materials added to the collection(s)
knowledge of statistical description, analysis, interpretation and presentation
knowledge of the costs associated with resources (materials, personnel, space, etc.)
knowledge of cost analysis and interpretation methods
knowledge of methods of resource allocation
state-of-the-art knowledge of research and practice in cataloging/indexing and techniques

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CATALOGING/INDEXING — ENTRY LEVEL

Basic Skills

literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

perform each activity
use computer and telecommunications equipment/systems with ease
apply cataloging/indexing rules consistently
perceive the needs of in-house staff and researchers for access to the collection(s)
establish rapport with colleagues
communicate well by written, verbal and non-verbal means
examine materials with keen observation
identify signs of deterioration in newly-acquired materials
quickly extract the main points of documents/information and present them concisely on the cataloging/ indexing records
be flexible in organizing collections for reference and research purposes
make decisions and recommendations based on available information
work independently
develop criteria for evaluation
make effective, timely, and well-informed decisions
isolate and define problems and develop the necessary criteria and action for their solution
manage time effectively
work under pressure of processing quotas

CATALOGING/INDEXING — MID LEVEL

Skills Related to Each Specific Activity

Skills listed above are developed to a greater extent

Ability to:

communicate with data processing staff and other support/contract staff on a technical level
arbitrate and negotiate with contractors
work in groups
conduct meetings with individuals and groups
supervise staff

CATALOGING/INDEXING — SENIOR LEVEL

Skills listed above are developed to a greater extent

Ability to:

identify the information about the collection(s) required to support the orgaznization and researchers
estimate the cost of processing the necessary information to support orgaznizational and researchers access to the collection(s)
anticipate long-range needs of the section and of the organization
design systems and procedures to improve operations of the section and of the organization
apply methods of measurement and evaluation
budget and make projections
optimize the use of organizational and section resources

CATALOGING/INDEXING

Dispositional Attitudes

Attitudes Toward Institutions

Respect for profession
Respect for the section
Respect for the parent organization

Attitudes Toward Other People

Toward Users

Respect users
Like people in general
Like to help people
Like to meet people
Like to make others feel comfortable
Sensitive to others' needs

Toward Others in the Workplace

Respect co-workers
Like to work with others/as a team
Like to work on own
Willingness to draw upon and share knowledge and experience with others
Supportive of co-workers
Enjoy managing/supervising others

Personal Qualities

Alertness
Assertiveness
Compassion/Kindness
Confidence
Cheerfulness
Dependability
Determination/Tenacity
Diplomacy
Emotional stability
Fairness
Flexibility/Versatility
Imagination
Inquisitiveness
Leadership ability

CATALOGING/INDEXING

Personal Qualities (cont'd)

Neatness
Need for achievement
Objectivity
Open-mindedness
Optimism/Positive attitude
Organization
Patience
Physical endurance
Resourceful
Sensitive/Thoughtful
Sense of humor
Sense of ethics
Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

Willingness to take/accept responsibility
Willingness to take initiative
Willingness to respond to authority, apply and follow policy
Realization that there is no single "right" way to achieve the goals of the section/organization
Desire to learn/try
Willingness to fail
Willingness to ask questions
Desire to work to best of ability
Responsiveness to time constraints
Accuracy
Willingness to get hands dirty
Attention to detail
Willingness to do clerical tasks
Desire to follow-through
Service orientation
Organizational identity
Willingness to promote parent organization and its services
View of parent organization as part of a larger information environment
Ability to see broad picture
Ability to sacrifice short-term gains for long-term goals
Political sense
Curiosity
Variety of interests
Desire to grow personally
Desire to grow professionally
Desire to remain current in specific and general subject field
Positive attitude toward job

ARCHIVIST/MUSEUM PROFESSIONAL COMPETENCIES

REFERENCE

ACTIVITIES

REFERENCE — ENTRY LEVEL

Solicited Searches

1. Interview users (in-house staff and researchers) to identify and clarify information requirements
2. Develop and implement strategy for obtaining, evaluating and packaging information to meet users' needs
3. Perform searches (online and/or manual) of in-house files, using proper subject terms and advanced search techniques to retrieve the requested information
4. Review retrieval output for relevancy
5. If additional searching is required, determine appropriate source(s) (printed publications, commerical/cooperative online databases, consultation with subject experts, reference staff of similar organizations, etc.)
6. Obtain original manuscripts/documents and/or copies of microform/photographic/videodisc images of materials in the organization's collection(s) or in collections of other institutions
7. Supervise packaging of search results for users
8. Obtain feedback from users on the adequacy and relevancy of the information provided; perform additional searching and document and/or image delivery, as required
9. Provide users with access to original materials in the collection(s), as appropriate
10. Refer researchers to other information sources, as appropriate
11. Refer more difficult information requests to higher-level reference staff, as apropriate

Other

12. Answer ready reference questions
13. Instruct users in reference methods, sources, services and policies
14. Perform bibliographic verification as required

REFERENCE — ENTRY LEVEL

Other (cont'd)

15. Recommend acquisition of printed and audiovisual materials, commercial database services, etc., for reference use

16. Recommend materials/data for inclusion in reference source files (vertical files and in-house indexes)

17. Supervise orderly maintenance of the reference room and re-shelving/re-filing of reference materials

18. Supervise return of original materials to their proper storage containers and/or storage areas

19. Notify collection maintenance staff of retrieved materials which show signs of deterioration or may require special treatment

20. Suggest ways in which any in-house/cooperative online files may be made more user-friendly

21. Complete necessary forms to suggest changes/additions to the subject headings and classification system(s) used in cataloging/indexing materials for the collection(s); forward forms to senior level section staff

22. Keep abreast of new and changing reference sources, services and tools

23. Keep abreast of new and developing technologies applicable to reference service

24. Keep abreast of developments in the subject field(s) of interest to the organization and in one's particular area of expertise

25. Participate in cross-education of staff by preparing and distributing staff alert forms or memos describing new information about the field(s) of interest to the organization, commercial/cooperative databases, specific types of equipment, visual image storage devices, etc.

26. Suggest ideas for exhibits; forward written recommendations to senior staff to the section

REFERENCE — MID LEVEL

Solicited Searches

27. Perform more complex searches

28. Assist entry level staff with any questions related to search sources, formulation and/or strategy

29. Provide special reference service for in-house staff by providing abstracts, critical annotations, extensive summaries of factual information, analytical reports, etc.

Other

30. Provide SDI service to staff

31. Prepare information brochures on the search programs and other services provided by the reference section to in-house staff and researchers

32. Develop and supervise operation of a tracking system in order to maintain control of the status of all search requests

33. Arrange for in-house/contract translation of selected foreign language documents, as requested by in-house staff

34. Identify other archives, museums, special collections, libraries, information centers and other information faciliaties which collect/ disseminate information in subject areas which supplement the organization's information collections

35. Contact these facilities to identify the services they would provide to the organization; note any costs associated with services

36. Organize and maintain reference source files (vertical files and in-house indexes)

37. Schedule and supervise shelf reading of the reference collection

REFERENCE	SENIOR LEVEL

Solicited Searches

38. Assist mid level staff in formulating the search strategies and packaging search and information results for particularly difficult topics

39. Spot check the search results obtained on solicited searches for in-house staff and researches

40. Identify experts that junior staff should contact to supply additional information to support specific information requests

41. Assign search and information requests to support exhibit planning, preparation and operation to appropriate entry and mid level staff for processing

42. Supervise and provide guidance to reference staff in all services supporting exhibit-related activities

43. Review and approve/modify all searches and information packages prepared by section staff for exhibit-related activities

Other

44. Function as a technical expert in all matters relating to reference search services and to preparation of information packages

45. Anticipate information needs of in-house staff; assign appropriate section staff to conduct searches and/or develop information packages on pertinent topics of potential interest to the organization

46. Cooperate with apropriate organizational staff in the development of special publications describing the history and/or collection(s) of the organization

47. Participte as a team member in exhibit team meetings

48. Obtain feedback from organizational staff regarding changes that they would recommend in the search services and in other service provided by the section

49. Work with senior staff of the exhibit managment section to identify publicly-and privately-owned institutions and private collectors who collect in areas which supplement and complement the organization's collection(s)

REFERENCE — SENIOR LEVEL

Other (cont'd)

50. Assist curatorial staff in reviewing the organization's existing collection(s) in one's area of expertise; identify areas of weakness

51. Provide the acquisitions section with pertinent information obtained from various sources which may lead to the eventual acquisition of significant materials for the collection(s)

52. Review suggestions by section staff for changes/additions to the subject headings and classification system(s) used in cataloging/indexing materials for the collection(s); forward forms to appropriate staff in the cataloging section

53. Compile lists of reference books and standard works which comprise a basic collection in each major subject area of interest to the organization; forward the lists to the acquisitions section for placement of standing orders for new editions of these works

54. Review and weed the reference collection on a regular basis

55. Review and weed the reference source files on a regular basis

56. Meet with appropriate staff of archives, museums, special collections, libraries, information centers and other information facilities in order to make the necessary arrangements to obtain special support, when required, to meet the organization's information needs

57. Represent the organization as a technical expert at meetings of networks, consortia and other cooperating groups

REFERENCE	ENTRY LEVEL

Basic knowledge

knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

knowledge of the primary subject fields of interest to the organization (e.g., history, art, science and technology, medicine, public administration, law, etc.)
knowledge in greater depth in specific subjects (e.g., history of art, history of science and technology, history of medicine, history of the civil war, etc.)
knowledge of foreign languages

Information Science Knowledge (Generic)

knowledge of definition, structure, and formats of information
knowledge of alternative approaches to the organization of information
knowledge of alternative approaches to retrieval of information
knowledge of alternative approaches to information management
knowledge of available and emerging information technologies and their applications
knowledge of completed and ongoing research in the field and its applicability to practice
knowledge of career opportunities
knowledge of how to learn on an ongoing basis

Knowledge about information work environments

knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
knowledge of the variety of work settings and their organizational structures
knowledge of the functions performed within the various work settings and the services and products offered
knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

knowledge of the reference functions, the range of services and products offered (both actual and potential)
knowledge of the activities that are required to offer the services and produce the products
knowledge of the various resources that are necessary to support the activities

REFERENCE — ENTRY LEVEL

Knowledge of what work is done (cont'd)

knowledge of reference tools
knowledge of reference methods and techniques
knowledge of job responsibilities
knowledge of performance expected and how it can be measured

Knowledge of how to do work

knowledge of how to perform the various activities
knowledge of how to use the reference tools
knowledge of how to apply the reference techniques
knowledge of signs of deterioration of materials in the collection(s)

Knowledge of the organization and specific work unit

knowledge of the mission, goals and objectives of the organization
knowledge of the structure of the organization and the role of the section within the organization
knowledge of the various projects and key personnel within the organization
knowledge of the policies and procedures relevant to section operations
knowledge of the various resources available within the organization (e.g. personnel, equipment, etc.)
knowledge of the information needs and requirements to support the mission, goals and objectives of the organization
knowledge of the organization's collection(s) and of related collections

REFERENCE — MID LEVEL

greater depths of knowledge specified above
knowledge of the operations of other sections in the organization and how they relate to reference
knowledge of available vendor-supplied systems, services and products to support reference
knowledge of the contracting process, both in general and within the organization
knowledge of evaluation methods and techniques to evaluate systems, services and products

REFERENCE	SENIOR LEVEL

greater depths of knowledge specified above
knowledge of the relative value/importance of of providing additional access to the collection(s) through preparation of special guides
knowledge of statistical description, analysis, interpretation and presentation
knowledge of the costs associated with resources (materials, personnel, space, etc.)
knowledge of cost analysis and interpretation methods
knowledge of methods of resource allocation
state-of-the-art knowledge of research and practice in reference techniques

REFERENCE — ENTRY LEVEL

Basic Skills

literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

perform each activity
use computer and telecommunications equipment/systems with ease
perceive the information needs of in-house staff and researchers
establish rapport with colleagues, experts and researchers
communicate well by written, verbal and non-verbal means
conduct an interview
listen carefully
translate a reference search request into visual terms
obtain/elicit required information from informal sources
collect, analyze and interpret data
quickly extract the main points of documents/information and present them concisely
identify signs of deterioration in materials in the collection(s)
make decisions and recommendations based on available information
work independently and in groups
develop criteria for evaluation
make effective, timely, and well-informed decisions
isolate and define problems and develop the necessary criteria and action for their solution
manage time effectively
stay organized while working on several projects at the same time
extract information which is not environment-specific to one project and use the information to support related projects
supervise staff

REFERENCE — MID LEVEL

Skills Related to Each Specific Activity

Skills listed above are developed to a greater extent

Ability to:

communicate with data processing staff and other support/contract staff on a technical level
arbitrate and negotiate with contractors
conduct meetings with individuals and groups

REFERENCE — SENIOR LEVEL

Skills listed above are developed to a greater extent

Ability to:

identify the information required to support each special project
anticipate information needs of in-house staff
estimate the cost of obtaining and processing the necessary information to support organizational needs
effect support from other information services/suppliers
anticipate long-range needs of the section and of the organization
identify and define gaps in information/ collecting coverage
design systems and procedures to improve operations of the section and of the organization
apply methods of measurement and evaluation
budget and make projections
optimize the use of organizational and section resources

ATTITUDES

REFERENCE

Dispositional Attitudes

Attitudes Toward Institutions

Respect for profession
Respect for the section
Respect for the parent organization

Attitudes Toward Other People

Toward Users

Respect users
Like people in general
Like to help people
Like to meet people
Like to make others feel comfortable
Sensitive to others' needs

Toward Others in the Workplace

Respect co-workers
Like to work with others/as a team
Like to work on own
Willingness to draw upon and share knowledge and experience with others
Supportive of co-workers
Enjoy managing/supervising others

Personal Qualities

Alertness
Assertiveness
Compassion/Kindness
Confidence
Cheerfulness
Dependability
Determination/Tenacity
Diplomacy
Emotional stability
Fairness
Flexibility/Versatility
Imagination
Inquisitiveness
Leadership ability

REFERENCE

Personal Qualities (cont'd)

Neatness
Need for achievement
Objectivity
Open-mindedness
Optimism/Positive attitude
Organization
Patience
Physical endurance
Resourceful
Sensitive/Thoughtful
Sense of humor
Sense of ethics
Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

Willingness to take/accept responsibility
Willingness to take initiative
Willingness to respond to authority, apply and follow policy
Realization that there is no single "right" way to achieve the goals of the section/organization
Desire to learn/try
Willingness to fail
Willingness to ask questions
Desire to work to best of ability
Responsiveness to time constraints
Accuracy
Willingness to get hands dirty
Attention to detail
Willingness to do clerical tasks
Desire to follow-through
Service orientation
Organizational identity
Willingness to promote parent organization and its services
View of parent organization as part of a larger information environment
Ability to see broad picture
Ability to sacrifice short-term gains for long-term goals
Political sense
Curiosity
Variety of interests
Desire to grow personally
Desire to grow professionally
Desire to remain current in specific and general subject field
Positive attitude toward job

ARCHIVIST/MUSEUM PROFESSIONAL COMPETENCIES

EXHIBIT MANAGEMENT

ACTIVITIES

EXHIBIT MANAGEMENT	ENTRY LEVEL

Exhibit Planning

1. Submit ideas for future exhibits to senior staff for review

2. Submit ideas/information on potential sources of exhibits and/or exhibit funding to senior staff for review

3. Attend and participate in brainstorming meetings to identify and/or develop themes for future exhibits

4. Draft portions of documentation to support presentation of exhibit proposals to senior administrative staff for review

Exhibit Development and Implementation

5. Attend and participate in exhibit team meetings

6. Work with mid level staff in preparing detailed exhibit plans; revise plans, as required, following review by exhibit director

7. Assist/work with exhibit consultants, as assigned

8. During the development phase, make recommendations to the exhibit director regarding plans and activities, as appropriate; suggest creation of additional displays or presentations in various media

9. Notify the exhibit director of any problems encountered in working on an exhibit

10. Use information prepared by the reference section to draft captions for displays, narratives for audiovisual presentations or copy for exhibit catalogs and guides

11. Assist mid level staff in drafting promotional materials for advertising new exhibits

12. Keep a detailed record of all costs incurred in development/support of each exhibit

13. Supervise recordkeeping for all in-house, borrowed and loaned exhibits

14. Assist in installing and removing exhibits, as appropriate

15. Assist in operating exhibits, as appropriate

EXHIBIT MANAGEMENT — ENTRY LEVEL

Exhibit Development and Implementation (cont'd)

16. Assist in preparing details and materials for exhibits loaned to other organizations

17. Notify mid level staff of any signs of deterioration noticed in materials in preparation for exhibit or on exhibit

EXHIBIT MANAGMENT — MID LEVEL

Exhibit Planning

18. Develop detailed outlines of proposed exhibits for presentation to senior administrative staff for review

19. Revise outlines of proposed exhibits based on review by senior staff of the section and of the administration

20. Draft documentation to seek funding support for specific proposed exhibits

21. Revise grant applications and other funding-related documentation following review by senior staff

22. Assist senior staff in planning and implementing all procedures required to arrange for borrowing exhibits prepared by other organizations, borrowing materials to supplement in-house collections and lending exhibits to other organizations

Exhibit Development and Implementation

23. Conduct meetings of sub-groups of the exhibit team

24. Develop and revise, as required, detailed exhibit plans

25. Develop a detailed schedule for the development of each exhibit

26. Following review and approval/modification of the schedule by the exhibit director. Track the progress of exhibit development and notify the exhibit director of any actual or potential delays

EXHIBIT MANAGEMENT — MID LEVEL

Exhibit Development and Implementation (cont'd)

27. Arrange for and coordinate the exhibit-related activities of contractors and other organizational units which provide support services (graphic design, printing, exhibit design, audiovisual services, work processing, reference, packing and moving/shipping, insurance, advertising, etc.)

28. Review and verify supplier billing/charging information

29. Compile monthly costs incurred for development of each exhibit and compare with the budgeted costs; prepare draft monthly reports for the respective exhibit directors

30. Supervise the production of and edit all documentation and narratives developed for inclusion in or for support of each exhibit

31. Develop online or manual files for control of in-house, borrowed and loaned exhibits, or arrange for cooperative use of existing acquisitions and/or cataloging/indexing files to maintain control of these materials

32. Coordinate procedures for setting up and operating exhibits

33. Notify appropriate collection maintenance staff when signs of deterioration are noticed in materials in preparation for exhibit or on exhibit

34. Function as assistant to the exhibit director on large-scale, complex exhibits; resolve minor problems and refer major problems to the exhibit director

35. Function as exhibit director for smaller, less complex exhibits

EXHIBIT MANAGEMENT — SENIOR LEVEL

Exhibit Planning

36. Establish and maintain contact with representatives of publicly-and privately-owned collections and with private collectors whose collections supplement and/or complement the organization's collection(s)

37. Establish and maintain contact with representatives of organizations which provide funding support for exhibits

EXHIBIT MANAGEMENT — SENIOR LEVEL

Exhibit Planning (cont'd)

38. Develop an overall exhibit program designed to educate the organization's user community; identify the information needs and interests of the population to be served

39. Identify exhibit themes which section staff should develop into exhibit proposals for review by senior administrative staff

40. Present and justify exhibit proposals to senior administrative staff for their reivew

41. Contact representatives of other collections in order to obtain commitments for loan, support or display of specific exhibits if funding support can be obtained; also contact proposed exhibit consultants to obtain commitments for support

42. Construct the basic development plan for approved exhibits, including staffing, scheduling and budget requirements; modify plans and requirements, as required, following review by senior administrative staff

43. Contact various sources to obtain funding for approved exhibits, as required

44. Conduct meetings with representatives of the funding organization(s), with representatives of the participating collections, and/or with exhibit consultants in order to finalize arrangments and resolve any questions which any of the parties may have

Exhibit Development and Implementation

45. Function as exhibit director for specific exhibits

46. Manage the in-house coordination of all activities related to exhibit development, installation, operation and removal

47. Manage the coordination of all external support required for exhibit development, installation, operation and removal

48. Review and approve/modify the detailed exhibit plans and schedule as developed by junior staff

49. Conduct exhibit team meetings and maintain effective communication with the team and its individual members

50. Organize the exhibit team by developing lines of authority, responsibility and accountability

EXHIBIT MANAGEMENT — SENIOR LEVEL

Exhibit Development and Implementation (cont'd)

51. Review with the exhibit team the goals, objectives, policies and procedures related to a specific exhibit

52. Lead, motivate and supervise the exhibit team

53. Anticipate, minimize and manage conflicts which may arise among exhibit team members

54. Act as a decision-maker and problem-solver among exhibit team members, as required

55. Assign specific tasks to exhibit consultants

56. Plan and conduct meetings of exhibit advisory groups

57. Assimilate information obtained from advisiors and from the exhibit team in order to further direct exhibit development efforts

58. Monitor and measure the progress of exhibit development and operations by reviewing staff reports on the schedule, costs and resources; formally request additional time and/or money, as required, to complete exhibit development or to extend exhibit operations

59. Evaluate the performance of exhibit team members in competing their respective assignments

60. Identify problems/discrepancies in exhibit development and operations; take corrective action

61. Review and approve/modify all portions of the exhibit before it is reviewed by senior administrators and representatives of supporting organizations

62. Coordinate and manage any required modifications to the exhibit prior to its opening to the public

63. Following the opening and/or removal of the exhibit, formally express appreciation to all organizations, private collectors and in-house staff who supported the exhibit

64. Monitor closely the return of all materials to lending organiations and/or to private collectors

65. File insurance claims and take appropriate action if materials are damaged, lost or stolen while on exhibit or in transit

EXHIBIT MANAGEMENT — ENTRY LEVEL

Basic knowledge

knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

knowledge of the primary subject fields of interest to the organization (e.g., history, art, science and technology, medicine, public administration, law, etc.)
knowledge in greater depth in specific subjects (e.g., public affairs, international affairs, military affairs, education of specific groups, etc.)
knowledge of foreign languages

Information Science Knowledge (Generic)

knowledge of definition, structure, and formats of information
knowledge of alternative approaches to the organization of information
knowledge of alternative approaches to retrieval of information
knowledge of alternative approaches to information management
knowledge of available and emerging information technologies and their applications
knowledge of completed and ongoing research in the field and its applicability to practice
knowledge of career opportunities
knowledge of how to learn on an ongoing basis
knowledge about information work environments
knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
knowledge of the variety of work settings and their organizational structures
knowledge of the functions performed within the various work settings and the services and products offered
knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

knowledge of the functions related to management of exhibits
knowledge of the exhibit management functions, the range of services and products offered (both actual and potential)
knowledge of the goals and objectives of each exhibit
knowledge of the activities that are required to support exhibit management, to offer the services and produce the products
knowledge of the various resources that are necessary to support the activities

EXHIBIT MANAGEMENT — ENTRY LEVEL

Knowledge of what work is done (cont'd)

knowledge of exhibit management tools
knowledge of exhibit management methods and techniques
knowledge of project management tools
knowledge of project management methods and techniques
knowledge of job responsibilities
knowledge of performance expected and how it can be measured

Knowledge of how to do work

knowledge of how to perform the various activities
knowledge of how to use exhibit management tools
knowledge of how to apply exhibit management methods and techniques
knowledge of how to use project management tools
knowledge of how to apply project management methods and techniques
Knowledge of signs of deterioration of materials

Knowledge of the organization and specific work unit

knowledge of the mission, goals and objectives of the organization
knowledge of the structure of the organization and the role of the section within the organization
knowledge of the various projects and key personnel within the organization
knowledge of the policies and procedures relevant to exhibit management operations
knowledge of the various resources available within the organization (e.g. personnel, equipment, etc.)
knowledge of the organization's collection(s) and of related privately- and publicly-owned collections

EXHIBIT MANAGEMENT — MID LEVEL

greater depths of knowledge specified above
knowledge of the basic principles of graphic design
knowledge of the basic principles of multi-media presentation
knowledge of the operations of other sections in the organization and how they relate to exhibit management
knowledge of available contractor-/vendor-supplied systems, services and products to support exhibit management and to support specific projects
knowledge of the contracting process, both in general and within the organization
knowledge of evaluation methods and techniques to evaluate systems, services and products

EXHIBIT MANAGEMENT	SENIOR LEVEL

greater depths of knowledge specified above
knowledge of public relations techniques
knowledge of potential sources of materials for exhibit
knowledge of potential funding support for exhibits
knowledge of techniques for teaching/training members of the exhibit preparation team to perform specific tasks
knowledge of specific packing, transport and display requirements to protect/conserve valuable materials
knowledge of statistical description, analysis, interpretation and presentation
knowledge of the costs associated with resources (materials, personnel, space, etc.)
knowledge of cost analysis and interpretation methods
knowledge of methods of resource allocation
state-of-the-art knowledge of research and practice in techniques for exhibit management
state-of-the-art knowledge of research and practice in project management techniques

EXHIBIT MANAGEMENT — ENTRY LEVEL

Basic Skills

literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

perform each activity
use computer/microcomputer, telecommunications and other new equipment/ technologies
perceive the information interests and needs of the exhibit viewer
establish rapport with colleagues
communicate well by written, verbal and non-verbal means
listen carefully
think and argue logically
obtain/elicit required information from formal and informal sources
examine materials with keen observation
collect, analyze and interpret data
make decisions and recommendations based on available information
work independently and in groups
develop criteria for evaluation
make effective, timely, and well-informed decisions
isolate and define problems and develop the necessary criteria and action for their solution
manage time effectively
work under pressure of strict deadlines
endure the stress of traveling and irregular work hours
stay organized while working on several exhibits at the same time
extract those aspects of a project/ exhibit which are not environment-specific and transfer them to related projects/exhibits
supervise staff

EXHIBIT MANAGEMENT — MID LEVEL

Skills Related to Each Specific Activity

Skills listed above are developed to a greater extent

Ability to:

edit documents, narratives, etc.
communicate with data processing staff and other in-house and support/ contract staff on a technical level
arbitrate and negotiate with contractors
conduct meetings with individuals and groups

EXHIBIT MANAGEMENT — SENIOR LEVEL

Skills listed above are developed to a greater extent

Ability to:

establish rapport with representatives of publicly-owned collections and with private collectors
effect cooperative agreement for exhibits with representatives of publicly-/privately-owned collections
identify appropriate and appealing themes for exhibits
develop realistic exhibit plans and cost estimates
justify exhibit plans and costs
assemble appropriate staff and consultants for each exhibit team
anticipate long-range needs of the organization and the effect of these needs on exhibit management
plan and schedule activities effectively
lead and motivate the individual members of the exhibit team
train members of the exhibit team
design systems and procedures to improve operations of the exhibit team, of the section and of the organization
apply methods of measurement and evaluation
budget and make projections
optimize the use of organizational and exhibit team resources
make recommendations with confidence
present salient features of exhibit management reports to representatives of funding organizations who may or may not be technically knowledgeable

EXHIBIT MANAGEMENT

Dispositional Attitudes

Attitudes Toward Institutions

Respect for profession
Respect for the section
Respect for the parent organization

Attitudes Toward Other People

Toward Users

Respect users
Like people in general
Like to help people
Like to meet people
Like to make others feel comfortable
Sensitive to others' needs

Toward Others in the Workplace

Respect co-workers
Like to work with others/as a team
Like to work on own
Willingness to draw upon and share knowledge and experience with others
Supportive of co-workers
Enjoy managing/supervising others

Personal Qualities

Alertness
Assertiveness
Compassion/Kindness
Confidence
Cheerfulness
Dependability
Determination/Tenacity
Diplomacy
Emotional stability
Fairness
Flexibility/Versatility
Imagination
Inquisitiveness
Leadership ability

EXHIBIT MANAGEMENT

Personal Qualities (cont'd)

Neatness
Need for achievement
Objectivity
Open-mindedness
Optimism/Positive attitude
Organization
Patience
Physical endurance
Resourceful
Sensitive/Thoughtful
Sense of humor
Sense of ethics
Tolerance

Attitudes Related to Job/Work/Organization

Individual should demonstrate:

Willingness to take/accept responsibility
Willingness to take initiative
Willingness to respond to authority, apply and follow policy
Realization that there is no single "right" way to achieve the goals of the section/organization
Desire to learn/try
Willingness to fail
Willingness to ask questions
Desire to work to best of ability
Responsiveness to time constraints
Accuracy
Willingness to get hands dirty
Attention to detail
Willingness to do clerical tasks
Desire to follow-through
Service orientation
Organizational identity
Willingness to promote parent organization and its services
View of parent organization as part of a larger information environment
Ability to see broad picture
Ability to sacrifice short-term gains for long-term goals
Political sense
Curiosity
Variety of interests
Desire to grow personally
Desire to grow professionally
Desire to remain current in specific and general subject field
Positive attitude toward job

ARCHIVIST/MUSEUM PROFESSIONAL COMPETENCIES

ORGANIZATION/MANAGEMENT SUPPORT

ACTIVITIES

ORGANIZATION/MANAGEMENT SUPPORT	ENTRY LEVEL

1. Identify materials to be included in section, master organization and personal files
2. Recommend purchase of professional publications/audiovisuals for inclusion in the staff library
3. Perform special studies, as assigned
4. Conduct business by phone, whenever appropriate
5. Write memos, letters, reports, etc. as required
6. Maintain a record of work performed and prepare a monthly report of activities
7. Prepare manuals of procedures
8. Make recommendations to the section manager for improvement in operations of the section
9. Attend and participate in staff meetings
10. Provide an overview of the operations of the section to visitors, as requested
11. Supervise technicians and other paraprofessional staff
12. Work to develop "esprit de corps" among staff supervised
13. Assist section manager in writing job descriptions for self and for staff supervised
14. Assist section manager in developing performance standards for self and for staff supervised
15. Assist section manager in the review and performance evaluation of staff supervised
16. Assist in the selection of new technicians and paraprofessionals
17. Keep abreast of developments and new and developing technologies in the information field and in related fields, as required
18. Attend professional meetings and prepare reports for dissemination to staff
19. Develop professional contacts both within and outside the parent organization

ACTIVITIES

ORGANIZATION/MANAGEMENT SUPPORT	MID LEVEL

20. Make preliminary selection of forms and/or develop draft record formats for files and operations, as appropriate

21. Weed section files, as assigned

22. Identify and evaluate commercially available systems/services to support section/organization activities

23. Assess performance of existing equipment/systems/services used in the section/organization and investigate capabilities of other equipment/systems/services

24. Recommend acquisition of new/additional equipment/systems/services

25. Train staff in operation and in-house maintenance of equipment/systems/services

26. Supervise in-house operation and maintenance of equipment/systems/services

27. Gather information for maintenance contracts on equipment/systems

28. Draft statements of work for contract proposals for services, systems, equipment and/or maintenance

29. Evaluate contractors' proposals

30. Act as contract monitor/technical representative, as assigned

31. Train and supervise entry level staff

32. Assist in the selection of new professional staff

33. Write articles for professional journals/newsletters when appropriate

ORGANIZATION/MANAGEMENT SUPPORT	SENIOR LEVEL

34. Review and dispose of materials/information selected for weeding/deletion from section files

35. Draft section procedures and policies; draft revisions as required

36. Flowchart and document section procedures

ACTIVITIES

ORGANIZATION/MANAGEMENT SUPPORT	SENIOR LEVEL

37. Assist section manager in on-going systems analysis of the section

38. Analyze statistics of section operations and prepare draft statistical reports

39. Train and supervise mid level staff

40. Assist section manager in preparing the annual budget for section operations

41. Function as section manager in his/her absence

42. Represent the section/organization at meetings, etc., as assigned

ORGANIZATION/MANAGEMENT SUPPORT — ENTRY LEVEL

Basic knowledge

knowledge related to literacy, numeracy, communications, etc.

Subject knowledge

knowledge of the primary subject fields of interest to the organization (e.g., art, science and technology, history, medicine, public administration, law, etc.)
knowledge of foreign languages

Information Science Knowledge (Generic)

knowledge of definition, structure, and formats of information
knowledge of alternative approaches to the organization of information
knowledge of alternative approaches to retrieval of information
knowledge of alternative approaches to information management
knowledge of available and emerging information technologies and their applications
knowledge of completed and ongoing research in the field and its applicability to practice
knowledge of career opportunities
knowledge of how to learn on an ongoing basis

Knowledge about information work environments

knowledge of the expanding information community, its participants and their interrelationships (social, economic, technical, etc.)
knowledge of the variety of work settings and their organizational structures
knowledge of the functions performed within the various work settings and the services and products offered
knowledge of the users of the services and products, their characteristics and information habits

Knowledge of what work is done

knowledge of the functions required to support section/organizational operations and management
knowledge of the activities that are required to offer the services and produce the products
knowledge of the various resources that are necessary to support the activities
knowledge of tools for training, supervising, and evaluating staff

ORGANIZATION/MANAGEMENT SUPPORT — ENTRY LEVEL

Knowledge of what work is done (cont'd)

- knowledge of tools for supporting section/organizational operations and management
- knowledge of methods and techniques for supporting section/organization operations and management
- knowledge of job responsibilities and working conditions (e.g., range of duties, probable compensation, benefits, etc.)
- knowledge of performance expected and how it can be measured

Knowledge of how to do work

- knowledge of how to perform the various activities
- knowledge of how to use the tools for training, supervising, and evaluating staff
- knowledge of how to use the tools for supporting section/organizational operations and management
- knowledge of how to apply the methods and techniques for training, supervising, and evaluating staff
- knowledge of how to apply the methods and techniques for supporting section/organizational operations and management
- knowledge of personnel procedures
- knowledge of standards, measures, and methods for evaluating personnel

Knowledge of the organization and specific work unit

- knowledge of the mission, goals and objectives of the organization
- knowledge of the structure of the organization and the role of one's section within the organization
- knowledge of the various projects and key personnel within the organization
- knowledge of the policies and procedures relevant to operations of one's section
- knowledge of the various resources available within the organization (e.g. personnel, equipment, etc.)
- knowledge of in-house information needs and requirements

ORGANIZATION/MANAGEMENT SUPPORT — MID LEVEL

greater depths of knowledge specified above
knowledge of the operations of other sections in the organization and how they relate to one's own section
knowledge of available vendor-supplied systems, services and products to support section/organizational operations and supervision/management
knowledge of the contracting process, both in general and within the organization
knowledge of evaluation methods and techniques to evaluate systems, services and products
knowledge of quality and production control techniques and procedures

ORGANIZATION/MANAGEMENT SUPPORT — SENIOR LEVEL

greater depths of knowledge specified above
knowledge of statistical description, analysis, interpretation and presentation
knowledge of the costs associated with resources (materials, personnel, space, etc.)
knowledge of cost analysis and interpretation methods
knowledge of methods of resource allocation
knowledge of alternative management structures and their implications for the operation of the section
state-of-the-art knowledge of research and practice in techniques for training, supervising, and evaluating staff
state-of-the-art knowledge of research and practice in techniques for supporting section/organizational operations and management

ORGANIZATION/MANAGEMENT SUPPORT — ENTRY LEVEL

Basic Skills

literacy, numeracy, cognitive, analytical, communications, etc.

Skills Related to Specific Activities

Ability to:

perform each activity
perceive the information needs of section staff and management
communicate well by written, verbal and non-verbal means
listen carefully
think and argue logically
think quickly in response to questions
project a positive attitude about the activities of the section/organization
make decisions and recommendations based on available information
work independently and in groups
develop criteria for evaluation
make effective, timely, and well-informed decisions
isolate and define problems and develop the necessary criteria and action for their solution
manage time effectively
conduct an interview
train staff
supervise staff
establish rapport with colleagues and with staff supervised
develop "espirt de corps" among staff supervised
conduct meetings with individuals and with groups
resolve conflicts among staff

ORGANIZATION/MANAGEMENT SUPPORT — MID LEVEL

Skills Related to Each Specific Activity

Skills listed above are developed to a greater extent

Ability to:

perceive the needs of the organization and not just of the section
understand the operation and maintenance requirements of equipment/systems/services used in the section/organization
write and evaluate contract-related documentation
communicate with data processing staff and various contractors on a technical level
arbitrate and negotiate with contractors

ORGANIZATION/MANAGEMENT SUPPORT — SENIOR LEVEL

Skills listed above are developed to a greater extent

Ability to:

anticipate long-range needs of the section and of the organization
design systems and procedures to improve operations of the section and of the organization
apply methods of measurement and evaluation
budget and make projections
optimize the use of organizational and section resources

ORGANIZATION/MANAGEMENT SUPPORT

Dispositional Attitudes

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